

## ***The Family Foundation Information Exchange (FFIX): A Conversation with Cathy Hession and Rachel Roth***

"These are my best friends in the foundation world," says Cathy Hession, of the Carol and James Collins Foundation, in describing the family foundation colleagues she joins bi-monthly at meetings of the Family Foundation Information Exchange (FFIX).

"It's like an extended family. I wouldn't have ever expected to feel this way about this group, but I do," adds Rachel Roth, Executive Director of the Roth Family Foundation, another of the Los Angeles-area group's members.

FFIX began in 2004 thanks to the vision of Jan Kern, Program Specialist for [Southern California Grantmakers \(SCG\)](#), who had been facilitating a peer learning group for local nonprofit organizations. She met individually with Hession and several others to gauge their interest in forming a similar group for family foundations. Soon after, FFIX was born. The concept: "to bring together a small group of Southern California family foundation executives (mostly, descendants of these foundations' donors) to meet on a regular basis to discuss, problem solve and share critical ideas that will assist them in their work."

Before each FFIX gathering, Kern mails group members a packet of materials to review based on a topic of their choosing. At meetings, members first share an emerging interest or some news related to their foundation. Then, they move to discussing the predetermined topic of the day. However, if one of the member's opening comments sparks interest, the group may choose to focus on that for a longer period of time. "Jan is a wonderful, objective facilitator committed to keeping our conversations productive, but allowing some flexibility when appropriate. Having an independent person in that role is crucial to operating a group like FFIX." At the end of each meeting, the members choose a topic for their next gathering. They also regularly review their activities and evaluate the group's value on an annual basis.

The collegial atmosphere of FFIX is a major reason for its success. "The first time FFIX met, some of us already knew each other, but regardless of our previous relationships, we established that confidentiality was an essential priority," says Roth. Our intent is to keep the group at its current size

(fifteen members) to ensure that the space we've created of trust, friendship, and open communication is maintained."

"The small size and consistency of FFIX is one of the reasons for its success," adds Hession. "SCG is looking at the possibility of creating a second FFIX to meet the needs of other local family foundations without disrupting the chemistry of our group."

FFIX is simple in concept, but from Hession and Roth's descriptions, the results have had a significant impact on their work and that of their colleagues. Both the Collins and Roth Foundations have missions grounded in strengthening vulnerable families, and Hession cites an example of how being members of the group has provided opportunities to leverage support for specific programs. "Rachel's foundation and mine have been strong supporters of [The MIND Institute's](#) work to create and distribute a new, computer-based curriculum for math students in grades K-8. One of its strengths is that it relies on pictures rather than verbal cues to present material, making it ideal for all students regardless of language barriers. To share our enthusiasm, she and I organized a site visit for funders including our fellow FFIX members to see the program in action at a local elementary school. One of the neat things about FFIX is how each of us is leveraging our own interests and receiving opportunities to piggyback on the work of others."

FFIX is not strictly focused on learning about different nonprofit programs, however. "Because this is only my fourth year as Executive Director of the foundation, the benefits for me have also been in learning more about the operational side of family philanthropy," Roth explains. "On topics like the special challenges of working with family boards and performing well as the only staff member, there's been real value in learning about the basics from a group of colleagues at other family foundations who understand the position I'm in."

"In some ways, we're acting as pro-bono consultants to each other on operational issues," says Hession. "In others, when it comes to sharing knowledge about local funding opportunities, it's as if each of us has a team of program officers to rely on."

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*Dr. Thomas Backer, President of the Los Angeles-based [Human Interaction Research Institute](#), observed FFIX meetings by invitation over the course of 2005. Read his [analysis of foundation learning groups](#), including a case study of FFIX beginning on page 5 of the document.*